

<b>12. PARTICIPANT CHANGES .....</b>	<b>2</b>
12.1 CHANGE HOUSEHOLD ID.....	2
12.2 VIEW HISTORY OF HOUSEHOLD ID CHANGE .....	5
12.3 FIND EXISTING HOUSEHOLD.....	7
12.4 SELECT EXISTING HOUSEHOLD .....	10
12.5 CREATE NEW HOUSEHOLD.....	13
12.6 MANUALLY TERMINATE PARTICIPANT .....	23
12.7 REINSTATE TERMINATED PARTICIPANT.....	27
12.8 PRODUCE VOC DOCUMENT .....	29
12.9 VOC DOCUMENT (OUTPUT).....	32
12.10 MANAGE HOUSEHOLD EBT ACCOUNT.....	42
12.11 EBT CARD HISTORY .....	51
12.12 EBT RECONCILED ACCOUNT TRANSACTIONS .....	54
12.13 EBT AGGREGATED ISSUANCE .....	58
12.14 EBT ACCOUNT BALANCE.....	62
12.15 EBT ACCOUNT BALANCE (OUTPUT) .....	67

## 12. Participant Changes

The functions in this chapter allow the user to make changes for the participant that occur after the certification attempt and do not necessarily pertain to direct WIC benefits delivery.

### 12.1 Change Household ID

The Change Household ID dialog allows the user to change the Household ID of the participant. The new Household ID can belong to an existing household, or the user can create a new household to assign to the participant. Additionally, the user may view the history of Household ID changes for the participant. The Change Household ID dialog is invoked when the user selects the Change Household ID menu item from the Participant Activities menu.

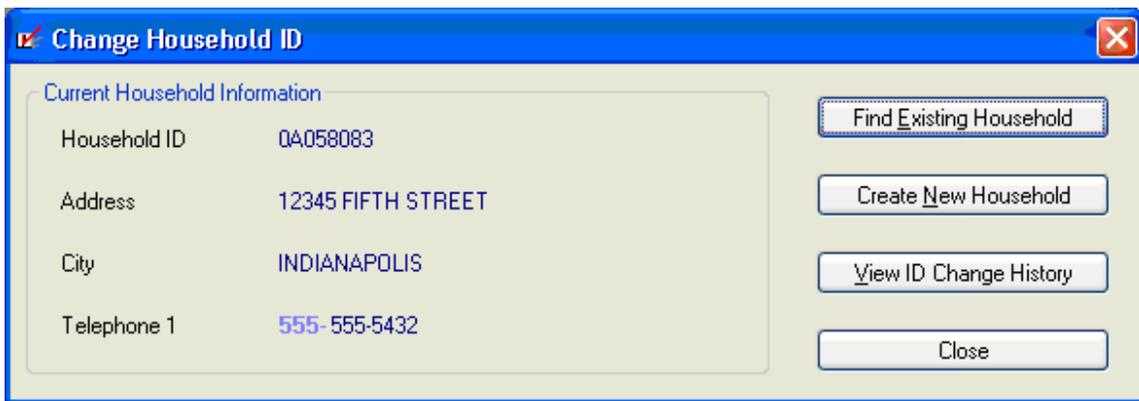


Figure 1 - Change Household ID Dialog

#### 12.1.1 Controls

This section describes the behavior of the controls on the Change Household ID dialog.

##### 12.1.1.1 Household ID Text and Value Label

This control allows the user to view the Household ID of the household to which the participant is currently assigned. The value label will be filled with the value of the Household-ID attribute of the MEMBER entity. It will display in the inverse color of the dialog.

#### *12.1.1.2 Address Text and Value Label*

This control allows the user to view the residence address of the household to which the participant is currently assigned. The value label will be filled with the value of the Address attribute of the HOUSEHOLD entity. It will display in the inverse color of the dialog.

#### *12.1.1.3 City Text and Value Label*

This control allows the user to view the residence city of the household to which the participant is currently assigned. The value label will be filled with the lookup value of the Legal-Municipality attribute of the HOUSEHOLD entity. It will display in the inverse color of the dialog.

#### *12.1.1.4 Telephone 1 Text and Value Label*

This control allows the user to view the first telephone number of the household to which the participant is currently assigned. The value label will be filled with the value of the Telephone-1 attribute of the HOUSEHOLD entity. It will display in the inverse color of the dialog.

#### *12.1.1.5 Find Existing Household Button*

This control allows the user to find an existing household within the system to which the participant will be assigned. The Find Existing Household button will be enabled when the Change Household ID dialog is active. It has a mnemonic of "E".

#### *12.1.1.6 Create New Household Button*

This control allows the user to create a new household in the system and assign the participant to it. The Create New Household button will be enabled when the Change Household ID dialog is active. It has a mnemonic of "N".

#### *12.1.1.7 View ID Change History Button*

This control allows the user to view the history of Household ID changes for the participant. The View ID Change History button will be enabled when the Change Household ID dialog is active. It has a mnemonic of "V".

#### *12.1.1.8 Close Button*

This control allows the user to close the Change Household ID dialog without affecting the Household ID of the participant. The control will be enabled when the Change Household ID dialog is active. Characteristics for the Close button are defined in *Consistencies*.

## 12.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Change Household ID dialog.

### 12.1.2.1 *Initializing the Interface*

The title bar text will be set to “Change Household ID”

The Household ID value label is populated from the Member.HouseholdID for the participant.

The Address value label is populated from Household.Address for the participant.

The City value label is populated with the literal value from the look update database from Household.City for the participant.

The Telephone 1 value label is populated from Household.Telephone1 for the participant.

### 12.1.2.2 *Find Existing Household*

Upon selection of the Find Existing Household button, the system will invoke the [Select Existing Household](#) dialog described in this document. Upon returning from the Select Existing Household dialog, the system will update the value of the Household ID label.

### 12.1.2.3 *Create New Household*

Upon selection of the Create New Household button, the system will invoke the [Create New Household dialog](#) described in this document. Upon returning from the Create New Household dialog, the system will update the value of the Household ID label.

### 12.1.2.4 *View History of Household ID Changes*

Upon selection of the View ID Change History button, the system will invoke the [View Household ID Change History dialog](#) described in this document.

## 12.2 View History of Household ID Change

The View Household ID Change History dialog allows the user to view the history of Household ID changes that have been made for the participant. This dialog is invoked when the user selects the View ID Change History button on the Change Household ID dialog.

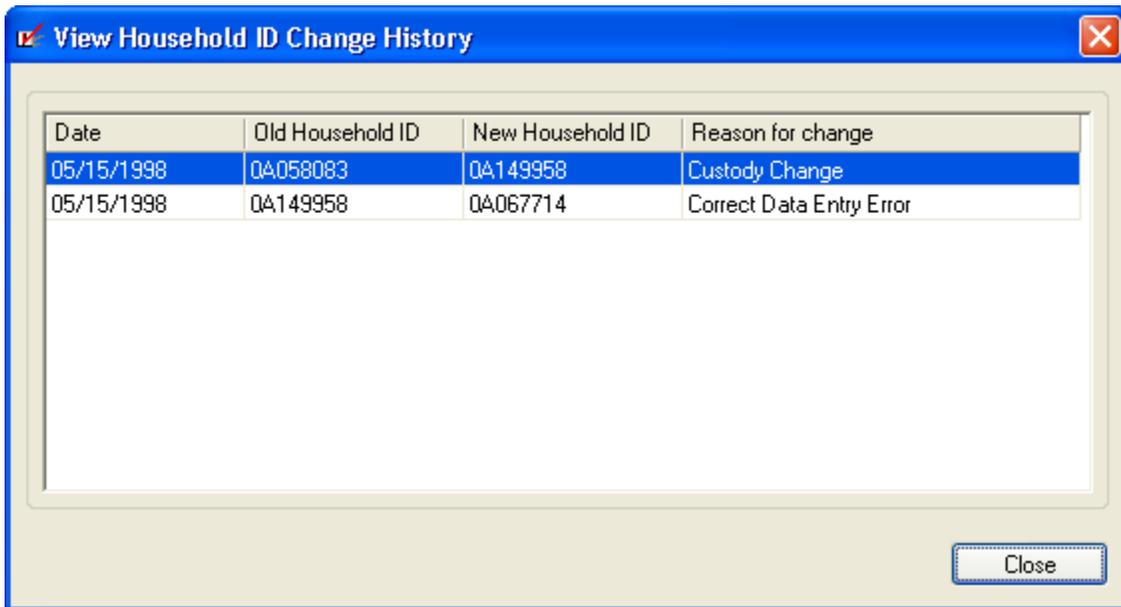


Figure 2 - View Household ID Change Dialog

### 12.2.1 Controls

This section describes the behavior of the controls on the View Household ID Change dialog.

#### 12.2.1.1 ID Change History Display Grid

This control allows the user to view the history of Household ID changes that have been made for the participant. The display grid will be enabled when the View Household ID Change dialog is active. It will consist of the following columns:

- Change Date (Date)
- Old Household ID
- New Household ID
- Reason for Change

The grid will contain an entry for each Household ID change recorded for the participant. The entries will be sorted in reverse chronological order according to the contents of the Change Date column. The values on the grid are read-only.

### *12.2.1.2 Close Button*

This control allows the user to exit the View Household ID Change dialog. The Close button will be enabled when the View Household ID Change dialog is active. Characteristics for the Close button are defined in *Consistencies*.

## **12.2.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Change Household ID dialog.

### *12.2.2.1 Initializing the Interface*

The title bar text will be set to “View Household ID Change History”

An entry will be added to the grid for each entry for the participant in the HouseholdChange entity. The View Household ID Change History display grid displays the following values:

- Date (HOUSEHOLDCHANGE.CREATEDATE)
- Old Household ID (HOUSEHOLDCHANGE.OLDHOUSEHOLDID)
- New Household ID (HOUSEHOLDCHANGE.NEWHOUSEHOLDID)
- Reason for Change (HOUSEHOLDCHANGE.CHANGEREASON)

### 12.3 Find Existing Household

The Find Existing Household dialog allows the user to search for a household in the Existing Household display grid on the Select Existing Household dialog. It is invoked when the user selects the Find button on the Change Household ID or Select Existing Household dialog.



Figure 3 - Find Existing Household Dialog

#### 12.3.1 Controls

This section describes the behavior of the controls on the Find Existing Household dialog.

##### 12.3.1.1 Search Criteria Radio Button Group

This control allows the user to select the type of information to search for the existing household. The radio button group will be enabled when the Find Existing Household dialog is active. It will consist of the following radio buttons:

- Household ID
- Address

The Household ID radio button will default to be selected.

When the Household ID radio button is selected, the Residence Address text box will be cleared and disabled. When the Address radio button is selected, the Household ID masked edit box will be cleared and disabled.

##### 12.3.1.2 Household ID Masked Edit Box

This control allows the user to enter the Household ID of an existing household for which to search in the Existing Households display grid of the Select Existing Household dialog. The masked edit box will be enabled when the Household ID radio button is selected. The masked edit box will only accept entry of alphanumeric digits. The mask on the box will be "#####". It will default to blanks.

### *12.3.1.3 Residence Address Text Box (Address)*

This control allows the user to enter the residence address of an existing household for which to search in the Existing Households display grid of the Select Existing Household dialog. The text box will be enabled when the Address radio button is selected. It will force all entered characters to upper case. The maximum size of this control will be fifty (50) characters. The control will default to no entry.

### *12.3.1.4 OK Button*

This control allows the user to instruct the system to edit the values of the controls, save the changes, and exit the Find Existing Household dialog. The OK button will be enabled when the Find Existing Household dialog is active. (See Saving the Data in the Processing section below) Characteristics for the OK button are defined in *Consistencies*.

### *12.3.1.5 Cancel Button*

This control allows the user to exit the Find Existing Household dialog without searching for a household. The Cancel button will be enabled when the Find Existing Household dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## **12.3.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Find Existing Household dialog.

### *12.3.2.1 Initializing the Interface*

The title bar text will be set to “Find Existing Household”

The Household ID radio button will be initially selected

### *12.3.2.2 Edit for Required Entry in Controls*

Upon selection of the OK button, the system will check that values have been entered the following controls:

- Search Criteria radio button group

If an entry is not made in one of the above-listed controls, the system will invoke a standard error message with the text “An entry is required in one of the {descriptive name of the control}”.

### 12.3.2.3 Edits

Upon completion of the above-listed edits, the system will check that legitimate values are entered in the controls as follows:

The value of the Household ID masked edit box must be valid.

Only characters A-Z, 0-9 and {space}, and the following characters (' . - # /) are allowed in the value of the Residence Address text box if a value has been entered into the control.

Upon completion of the above-listed edits, the system will perform the following cross-edits:

- If the Household ID radio button is selected, the Household ID masked edit box must have a legitimate value.
- If the Address radio button is selected, the Residence Address text box must have a legitimate value.

### 12.3.2.4 Search on Household ID

Upon completion of the above-listed edits, if the Household ID radio button is selected the system will search for an existing household with the Household ID equal to the value specified in the Household ID masked edit box.

If the system finds a match, it will select the appropriate entry in the Existing Households display grid on the Select Existing Household dialog and exit the Find Existing Household dialog.

If the system does not find a match, it will invoke a standard error message with the text “No household record was found matching specified criteria.” and will return to the Find Existing Household dialog.

### 12.3.2.5 Search on Residence Address

Upon completion of all edits, if the Address radio button is selected the system will search for an existing household with a residence equal to the value specified in the Residence Address text box up to the number of characters specified.

If the system finds a match, it will select the appropriate entry in the Existing Households display grid on the Select Existing Household dialog and exit the Find Existing Household dialog.

If the system does not find a match, it will invoke a standard error message with the text “No household record was found matching specified criteria.” and will return to the Find Existing Household dialog.

## 12.4 Select Existing Household

The Select Existing Household dialog allows the user to select an existing household to which the participant should be assigned. It is invoked when the user selects the OK button on the Find Existing Household dialog.

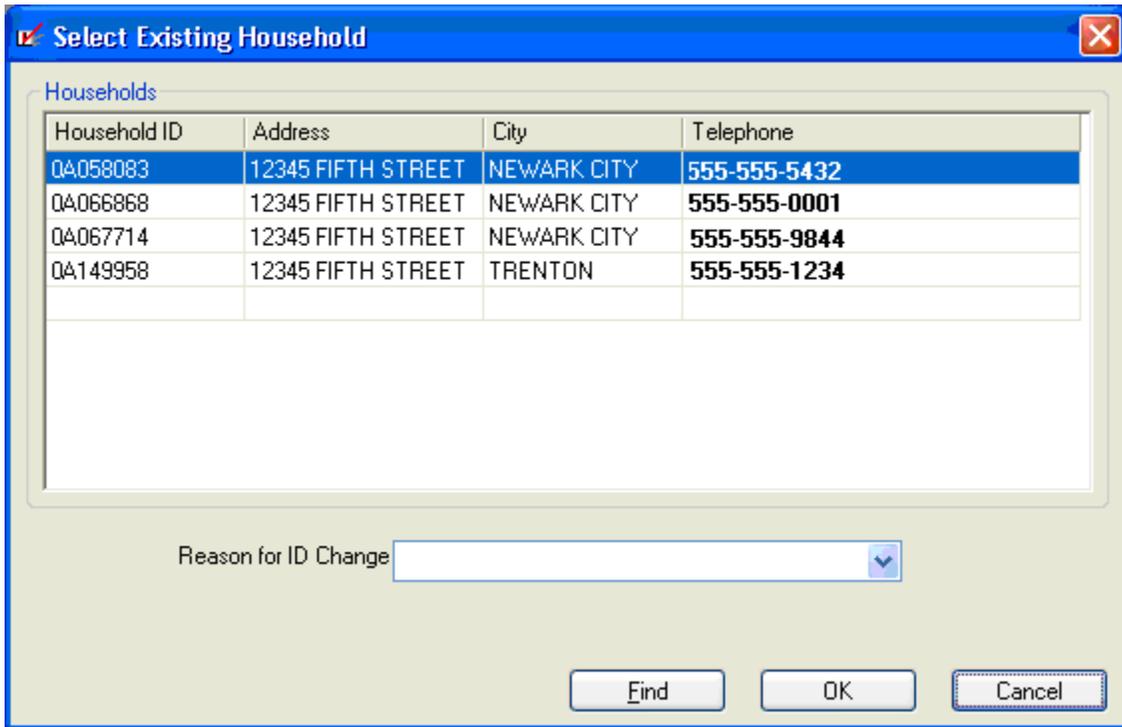


Figure 4 - Select Existing Household Dialog

### 12.4.1 Controls

This section describes the behavior of the controls on the Select Existing Household dialog.

#### 12.4.1.1 Existing Households Display Grid (Households)

This control allows the user to select an existing household to which the participant should be assigned. The display grid will be enabled when the Select Existing Household dialog is active. It will consist of the following columns:

- Household ID
- Residence Address (Address)
- Residence City (City)
- Telephone 1 (Telephone)

The grid will contain an entry for each household that met the criteria within the system. The entries will be sorted according to the value of the Household ID. The values on the grid are read-only.

#### *12.4.1.2 Reason for ID Change Dropdown*

This control allows the user to select the reason the Household ID of the participant is being changed. The dropdown will be enabled when the Select Existing Household dialog is active. It will be filled from a list of valid reasons to change the Household ID of the participant from the reference dictionary table of the lookup database. The control will default to blanks.

#### *12.4.1.3 Find Button*

This control allows the user to display the Find Existing Household dialog. The Find button will be enabled when the Select Existing Household dialog is active. It has a mnemonic of “F”.

#### *12.4.1.4 OK Button*

This control allows the user to instruct the system to edit the values of the controls, save the changes, and exit the Select Existing Household dialog. The OK button will be enabled when the Select Existing Household dialog is active. (See Saving the Data in the Processing section below) Characteristics for the OK button are defined in *Consistencies*.

#### *12.4.1.5 Cancel Button*

This control allows the user to exit the Select Existing Household dialog without selecting a household. The Cancel button will be enabled when the Select Existing Household dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### **12.4.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Select Existing Household dialog.

#### *12.4.2.1 Initializing the Interface*

The title bar text will be set to “Select Existing Household”

The first entry in the Households display grid will be initially selected.

The entries in the Households display grid will be sorted in numeric order according to the Household ID column.

An entry will be added to the grid for each Household ID that meets the search criteria specified on the Find Existing Household ID. The Household display grid displays the following values:

- Household ID (HOUSEHOLD.HOUSEHOLD.ID)
- Address (HOUSEHOLD.ADDRESS)
- City (HOUSEHOLD.CITY)
- Telephone (HOUSEHOLD.TELEPHONE1)

The Reason for ID Change dropdown will be initially blank.

#### *12.4.2.2 Edit for Required Entry in Controls*

Upon selection of the OK button, the system will check that values have been entered in the following controls:

- Existing Households display grid (at least one entry selected)
- Reason for ID Change dropdown

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text “An entry is required for the {descriptive name of value represented by control}”.

#### *12.4.2.3 Find Existing Household*

Upon selection of the Find button, the system will invoke the Find Existing Household described in this chapter.

#### *12.4.2.4 Change Household ID for Participant*

Upon successful completion of all edits, the system will set the Household-ID attribute of the MEMBER entity for the participant to the Household ID of the household selected on the Existing Households display grid.

## 12.5 Create New Household

The Create New Household dialog allows the user to enter information for a new household to which the participant will be assigned. It is invoked when the user selects the Create New Household button on the Change Household ID dialog.

The screenshot shows a Windows-style dialog box titled "Create New Household". The dialog is light beige with a blue border and a blue title bar containing a close button (X). The fields are as follows:

- Address:** A single-line text input field.
- County:** A dropdown menu.
- City:** A dropdown menu.
- State:** A dropdown menu.
- ZIP:** A text input field with a hyphen and a space for the last two digits.
- Mail:** A section with a "Same as Residence" button and fields for "Address", "City", "State", and "ZIP".
- How Heard about WIC:** A dropdown menu.
- Telephone 1:** A text input field with a hyphen and a space for the last two digits, followed by a "Comment" text input field.
- Telephone 2:** A text input field with a hyphen and a space for the last two digits, followed by a "Comment" text input field.
- Household Language:** A section with "Language1" and "Language2" dropdowns, each with "Read" and "Spoken" checkboxes, and a "Need Interpreter" checkbox.
- Reason for ID Change:** A dropdown menu.
- Buttons:** "EBT Account", "OK", and "Cancel" buttons at the bottom.

Figure 5 - Create New Household Dialog

### 12.5.1 Controls

This section describes the behavior of the controls on the Create New Household dialog.

#### *12.5.1.1 Residence Address Text Box (Address)*

This control allows the user to enter the residence address of the participant. The text box will be enabled when the Create New Household dialog is active. It will force all entered characters to upper case. The maximum size of this control will be fifty (50) characters. It will initially be blank.

#### *12.5.1.2 Residence County Dropdown (County)*

This control allows the user to select the residence county of the participant from a list of valid counties. The dropdown will be enabled when the Create New Household dialog is active and a valid 2-character State code has been entered in the Residence State masked edit box. The County Dropdown will display a sub-set list of counties listed in the County entity sub-set by StateCD. Upon a selection in the County dropdown the City dropdown will become enabled. Upon a change in county, the Residence City Dropdown will be cleared and remain enabled.

#### *12.5.1.3 Residence City Dropdown (City)*

This control allows the user to select the residence city of the participant from a list of valid municipalities. The dropdown will be enabled when the Create New Household dialog is active and a county is selected in the Residence County dropdown. The dropdown will contain a sub-set list of cities listed in the LocalMunicipality entity sub-set by the value selected in the Residence County dropdown. Upon a change in County, this value will be cleared and the sub-set of data will be refreshed.

#### *12.5.1.4 Residence State Masked Edit Box (State)*

This control allows the user to enter the residence state of the participant. The masked edit box will be enabled when the Create New Household dialog is active. It will only allow the entry of alphabetic characters. It will convert all characters to upper case. The mask for the box will be "AA" to allow entry of 2-character State postal code. It will default to the postal code value for your State. Upon a change in State the County and City dropdowns will become blank.

#### *12.5.1.5 Residence ZIP Code Masked Edit Box (ZIP)*

This control allows the user to enter the ZIP code of the participant. The masked edit box will be enabled when the Create New Household dialog is active. It will only allow the entry of numeric characters. The mask for the box will be "#####-#####" to allow entry of a four digit ZIP extension, if known.

Upon entering a value in the ZIP, if the ZIP code is found in the CountyCityByZip entity and the following values are blank, the blank values will be automatically populated as follows:

- State masked edit box - the system will populate the State masked edit box with the CountyCityByZip.StateCD.
- County dropdown - the system will populate the County dropdown with the County.Name where CountyCityByZip.County = County.HealthCountyID
- City dropdown - the system will populate the City dropdown with the LocalMunicipality.Name where CountyCityByZip.County = LocalMunicipality.HealthCountyID and LocalMunicipality.LocalMunicipalityID

If a value exists for the Residence State, County and City and the user enters or modifies the ZIP, the system will not overwrite the previous entry/selection.

Upon entering a value in the ZIP, if the ZIP code is not found in the CountyCityByZip entity, the system will bypass the automatic update process.

#### *12.5.1.6 Mailing Address Same as Residence Button (Same as Residence)*

This control allows the user to copy the residence address, residence city, and residence ZIP code of the participant to the mailing address. The Mailing Address Same as Residence button will be enabled when the Create New Household dialog is active.

#### *12.5.1.7 Mailing Address Text Box (Address)*

This control allows the user to enter the mailing address of the participant. The text box will be enabled when the Create New Household dialog is active. It will force all entered characters to upper case. The maximum size of this control will be fifty (50) characters. It will initially be blank.

#### *12.5.1.8 Mailing City Text Box (City)*

This control allows the user to enter the mailing city of the participant. The text box will be enabled when the Create New Household dialog is active. It will force all entered characters to upper case. The maximum size of this control will be thirty (30) characters. It will initially be blank.

#### *12.5.1.9 Mailing State Masked Edit Box (State)*

This control allows the user to enter the mailing state of the participant. The masked edit box will be enabled when the Create New Household dialog is active. It will only allow the entry of alphabetic characters. The mask for the box will be "AA" to allow entry of a State postal code. It will default to a value of your state.

#### *12.5.1.10 Mailing ZIP Code Masked Edit Box (ZIP)*

This control allows the user to specify the mailing ZIP code of the participant. The masked edit box will be enabled when the Create New Household dialog is active. It will only allow the entry of numeric characters. The mask for the box will be "#####-####" to allow entry of a four digit ZIP extension if known. It will initially be blank.

#### *12.5.1.11 How Heard about WIC Dropdown*

This control allows the user to select the method by which the participant first heard about WIC. The dropdown will be enabled when the Create New Household dialog is active. It will contain a list of acceptable values for how the participant heard about the WIC program from the reference dictionary table of the lookup database. It will initially be blank.

#### *12.5.1.12 Telephone 1 Masked Edit Box*

This control allows the user to enter the first telephone number at which the participant may be reached. The masked edit box will be enabled when the Create New Household dialog is active. It will only allow the entry of numeric characters. The mask for the box will be "###-###-####" to allow entry of an area code and seven digit telephone number. The area code portion of this box will default from the established Clinic defaults.

#### *12.5.1.13 Telephone 1 Comment Text Box (Comment)*

This control allows the user to specify any clarifying information about the first telephone number of the participant. The text box will be enabled when the Create New Household dialog is active. The maximum size of this control will be thirty (30) characters. It will initially be blank.

#### *12.5.1.14 Telephone 2 Masked Edit Box*

This control allows the user to enter the second telephone number at which the participant may be reached. The masked edit box will be enabled when the Create New Household dialog is active. It will only allow the entry of numeric characters. The mask for the box will be “###-###-####” to allow entry of an area code and seven digit telephone number. The area code portion of this box will default from the established Clinic defaults.

#### *12.5.1.15 Telephone 2 Comment Text Box (Comment)*

This control allows the user to enter any clarifying information about the second telephone number of the participant. The text box will be enabled when the Create New Household dialog is active. The maximum size of this control will be thirty (30) characters. It will initially be blank.

#### *12.5.1.16 Language 1 Dropdown*

This control allows the user to select the primary language of the participant. The dropdown will be enabled when the Create New Household dialog is active. It will contain a list of languages from the reference dictionary table of the lookup database. The dropdown will default to the default language specified for the Clinic.

#### *12.5.1.17 Language 1 Read Check Box (Read)*

This control allows the user to indicate that the participant reads the primary language. The checkbox will be enabled when the Create New Household dialog is active. It will default to selected.

#### *12.5.1.18 Language 1 Spoken Check Box (Spoken)*

This control allows the user to indicate that the participant speaks the primary language. The checkbox will be enabled when the Create New Household dialog is active. It will default to selected.

#### *12.5.1.19 Language 2 Dropdown*

This control allows the user to select the secondary language of the participant, if applicable. The dropdown will be enabled when the Create New Household dialog is active. It will contain a list of languages from the reference dictionary table of the lookup database. It will initially be blank.

#### *12.5.1.20 Language 2 Read Check Box (Read)*

This control allows the user to indicate that the participant reads the secondary language. The check box will be enabled when the secondary language is selected in the Language 2 dropdown. It will default to cleared.

#### *12.5.1.21 Language 2 Spoken Check Box (Spoken)*

This control allows the user to indicate that the participant speaks the secondary language. The check box will be enabled when the secondary language is selected in the Language 2 dropdown. It will default to cleared.

#### *12.5.1.22 Need Interpreter Check Box*

This control allows the user to indicate that an interpreter is needed for encounters with the participant. The check box will be enabled when the Create New Household dialog is active. It will default to cleared.

#### *12.5.1.23 Reason for ID Change Dropdown*

This control allows the user to select the reason the Household ID of the participant is being changed. The dropdown will be enabled when the Create New Household dialog is active. It will be filled from a list of valid reasons to change the Household ID of the participant from the reference dictionary table of the lookup database. The control will default to blanks.

#### *12.5.1.24 EBT Account Button*

This control allows the user to manage the EBT Account Information for this Household. This button will be **disabled** if the FI\_ENABLE\_DELIVERYSYSTEMTYPE\_EBT business rule is set to “N” (No) or if the ServiceSite logged into is not EBT certification status is set to “Not Ready”.

#### *12.5.1.25 OK Button*

This control allows the user to instruct the system to edit the values of the controls, save the changes, and exit the Create New Household dialog. The OK button will be enabled when the Create New Household dialog is active. (See *Saving the Data* in the Processing section below) Characteristics for the OK button are defined in *Consistencies*.

### 12.5.1.26 Cancel Button

This control allows the user to exit the Create New Household dialog without creating a new household and changing the Household ID of the participant. The Cancel button will be enabled when the Create New Household dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 12.5.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create New Household dialog.

### 12.5.2.1 Initializing the Interface

The title bar text is set to “Create New Household”

The following values will initially be blank:

- Residence Address
- Residence County
- Residence City
- Residence ZIP
- Mailing Address
- Mailing City
- Mailing ZIP
- How Heard about WIC
- Telephone 1
- Comment
- Telephone 2
- Comment
- Household Language 2
- Read check box
- Spoken check box
- Need Interpreter check box
- Reason for ID Change dropdown

The Language 1 value is populated with the default value defined for Language for the specified Clinic selected when the user logged into the application (Refer to Clinic Settings in Application Administration Chapter 01 - System Administration). If the default value for Language is not defined for the Clinic, the value will initially be blank.

Read check box for Language 1 is initially checked

Spoken check box for Language 1 is initially checked

The Mailing State defaults to the State defined in the State Profile entity.

### 12.5.2.2 Edits

Upon selection of the OK button, the system will check that values have been entered in the following controls:

- Residence Address text box
- Residence County dropdown
- Residence City dropdown
- Residence ZIP Code masked edit box
- Mailing Address text box
- Mailing City text box
- Mailing State text box
- Mailing ZIP Code masked edit box
- Reason for ID Change dropdown

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text “An entry is required for the {descriptive name of value represented by control}”.

Upon successful completion of the above-listed edits, the system will check for legitimate values in controls as follows:

Only characters A-Z, {space}, and the following characters ( ' . , - ) are allowed in the Mailing City text box.

Only characters A-Z, 0-9, {space}, and the following characters ( ' . - # / ) are allowed in the values of the following controls:

- Residence Address Text Box
- Mailing Address Text Box

Only characters A-Z and {space} are allowed in the Mailing State text box.

The system will check that a 10-digit telephone number has been entered in the Telephone 1 masked edit box and Telephone 2 masked edit box if any values are entered into these controls.

The system will check that a 5-digit or 9-digit ZIP code is entered into the Residence ZIP Code masked edit box and the Mailing ZIP Code masked edit box.

### 12.5.2.3 Create New Household

Upon selection of the OK button, the system will retrieve the next available Household ID and create a new household record with the Household ID and the values on the Create New Household dialog. The Household-ID attribute of the MEMBER entity for the participant will be set to the new Household ID.

12.5.2.4 Data Map

Control Label	Entity	Attribute	Business Rule
HouseHoldID (system generated)	Household Member	HouseholdID	
(Residence) Address	Household	Address	
(Residence) County	Household	County	
(Residence) City	Household	LegalMunicipality & LocalMunicipality	
(Residence) State	Household	State	
(Residence) ZIP	Household	ZIP	
Mailing Address	Household	MailAddress	
Mailing City	Household	MailCity	
Mailing State	Household	MailState	
Mailing ZIP	Household	MailZIP	
How Heard about WIC	Household	HowHeardAboutW IC	
Telephone 1	Household	Telephone1	
Comment (1)	Household	Comment1	
Telephone 2	Household	Telephone2	
Comment (2)	Household	Comment2	
Language 1	Household	Language1	
Read (1)	Household	Language1Read	

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>	<b>Business Rule</b>
Spoken (1)	Household	Language1Spoken	
Language (2)	Household	Language2	
Read (2)	Household	Language2Read	
Need Interpreter	Household	InterpreterNeeded	

## 12.6 Manually Terminate Participant

The Manually Terminate Participant dialog allows the user to manually terminate an active certification period for the participant. It is invoked when the user selects the Manually Terminate Participant menu item from the Participant Activities menu.



Figure 6 - Manually Terminate Participant Dialog

### 12.6.1 Controls

This section describes the behavior of the controls on the Manually Terminate Participant dialog.

#### 12.6.1.1 Termination Date Masked Edit Box

This control allows the user to enter the date on which the participant will be terminated. The masked edit box will be enabled when the Manually Terminate Participant dialog is active. The masked edit box will only accept entry of numeric digits. The mask on the box will be “###/###/####” to accept a date with a four digit year.

The string entered must be a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”

#### 12.6.1.2 Termination Reason Dropdown

This control allows the user to select the reason why the participant is being manually terminated. The dropdown will be enabled when the Manually Terminate Participant dialog is active. It will be filled with a list of reasons for manual termination from the reference dictionary table of the lookup database.

### 12.6.1.3 Generate Official Notice Check Box

This control allows the user to generate an official notification for the participant. The check box will be enabled when the Manually Terminate Participant dialog is active.

### 12.6.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, save the changes, and exit the Manually Terminate Participant dialog. The OK button will be enabled when the Manually Terminate Participant dialog is active (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 12.6.1.5 Cancel Button

This control allows the user to exit the Manually Terminate Participant dialog without terminating the participant. The Cancel button will be enabled when the Manually Terminate Participant dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 12.6.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Manually Terminate Participant dialog.

### 12.6.2.1 Initializing the Interface

The following steps are followed in displaying the data:

- The title bar text is set to “Manually Terminate Participant”
- The Terminated Date will default to the current system date.
- The Terminated Reason dropdown will be blank.
- The Generate Official Notice check box will be marked.

### 12.6.2.2 Edits

Upon selection of the OK button, the system will check that values have been entered in the following controls:

- Termination Date masked edit box
- Termination Reason dropdown

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text “An entry is required for the {control label}”.

Upon completion of the above-listed edits, the system will check that legitimate values are entered in the controls as follows:

- The value of the Termination Date masked edit box must be a date equal to or greater than the current system date.
- The value of the Termination Date masked edit box must be a date less than or equal to the ending date of the current certification period for the participant.

If the above date edits are not met the system will invoke a standard error message with the text “Termination date must be a date equal to or greater than current date and less than or equal to the ending date of the current certification period.”

#### *12.6.2.3 Terminate Participant*

Upon selection of the OK button the system will terminate the participant’s current certification. The participant is now considered terminated and not in a valid certification period. The system will exit the Manually Terminate Participant dialog and return to the Participant Folder.

#### *12.6.2.4 Generate Official Notice*

Upon selection of the OK button, if Generate Official Notice is checked:

- If the Household.CorrespondenceLanguage = ‘S’ (Spanish), the system will generate the Official Notice in Spanish described in this document.
- If the Household.CorrespondenceLanguage = ‘E’ (English) the system will generate the Official Notice in English
- The system will send the generated notice to the selected output printer (see *System Tools*).

*12.6.2.5 Data Map*

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>	<b>Business Rule</b>
Terminated Date	CertContact	CertTermDate	
	Member	TerminatedDate	
Termination Reason	CertContact	CertTermReason	
Generate Official Notice	CertContact	CreateTerminationNotice (=Y when notice is produced)	
Terminated (system generated)	Member	Terminated (=Y when participant is terminated)	
VOCDocument(system generated)	Member	VOCDocument (=N when participant is terminated)	

## 12.7 Reinstatement Terminated Participant

The Reinstatement Terminated Participant dialog allows the user to reinstate a participant who was terminated during a certification period that has not yet expired. It is invoked when the user selects the Reinstatement Terminated Participant menu item from the Participant Activities Menu.

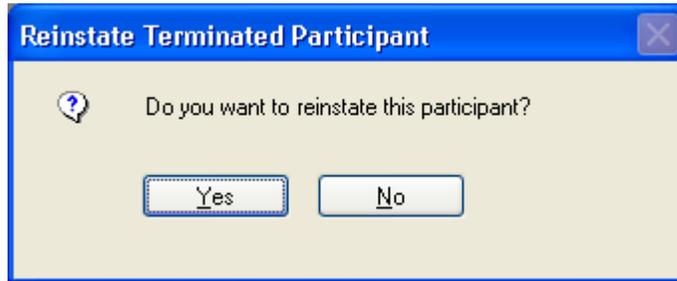


Figure 7 - Reinstatement Terminated Participant Message Box

### 12.7.1 Controls

This section describes the behavior of the controls on the Reinstatement Terminated Participant dialog.

#### 12.7.1.1 Yes Button

This control allows the user to confirm that the participant should be reinstated. The Yes button will be enabled when the Reinstatement Terminated Participant dialog is active. It has a mnemonic of “Y” and is the default button for the dialog.

#### 12.7.1.2 No Button

This control allows the user to exit the Reinstatement Terminated Participant dialog without reinstating the participant. The No button will be enabled when the Reinstatement Terminated Participant dialog is active. It has a mnemonic of “N” and is the cancel button for the dialog.

### 12.7.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Reinstatement Terminated Participant dialog.

#### 12.7.2.1 Initializing the Interface

The following steps are followed in displaying the data:

- The title bar text is set to “Reinstatement Terminated Participant”

- The Yes button will be initially selected

**12.7.2.2 Reinstate Participant**

Upon selection of the Yes button, the system will reinstate the participant and validate the certification period.

**12.7.2.3 Data Map**

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>	<b>Business Rule</b>
Terminated Date	CertContact Member	CertTermDate (value will be cleared) TerminatedDate(value will be cleared)	
Termination Reason	CertContact	CertTermReason (value will be cleared)	
Terminated (system generated)	Member	Terminated(value will be cleared)	
VOCDocument(system generated)	Member	VOCDocument (=Y when participant is reinstated)	

## 12.8 Produce VOC Document

The Produce VOC Document dialog allows the user to produce a Verification of Certification document for the participant, and optionally terminate the participant if the participant is moving out of the State. Only one VOC document may be produced for a participant during a certification period. The Produce VOC Document dialog is invoked when the user selects the Produce VOC Document menu item from the Participant Activities menu.

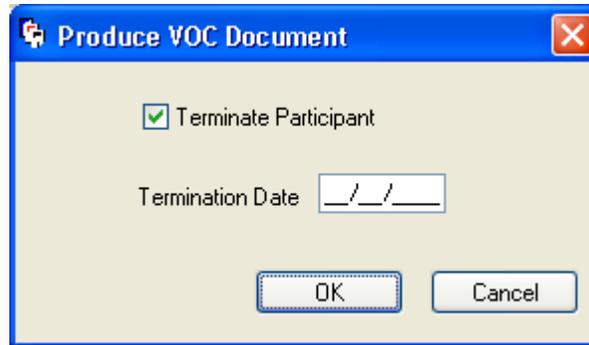


Figure 8 - Produce VOC Document Dialog

### 12.8.1 Controls

This section describes the behavior of the controls on the Produce VOC Document dialog.

#### 12.8.1.1 Terminate Participant Check Box

This control allows the user to indicate that the system should terminate the participant because the participant is moving out of the State. The check box will be enabled when the Produce VOC Document dialog is active. It will default to cleared.

Upon selecting the check mark in the check box, the Termination Date masked edit box will be enabled.

#### 12.8.1.2 Termination Date Masked Edit Box

This control allows the user to specify the date on which the participant should be terminated. The masked edit box will be enabled when the Terminate Participant check box is selected. The masked edit box will only accept entry of numeric digits. The mask on the box will be “###/###/####” to accept a date with a four digit year. The control will default to no entry.

The string entered must be a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”

### *12.8.1.3 OK Button*

This control allows the user to instruct the system to edit the values of the controls, save the changes, and exit the Produce VOC Document dialog. The OK button will be enabled when the Produce VOC Document dialog is active. (See the Processing section below) Characteristics for the OK button are defined in *Consistencies*.

### *12.8.1.4 Cancel Button*

This control allows the user to exit the Produce VOC Document dialog without producing the VOC document. The Cancel button will be enabled when the Produce VOC Document dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## **12.8.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Produce VOC Document dialog.

### *12.8.2.1 Initializing the Interface*

The title bar text is set to “Produce VOC Document”

The Terminated Date will initially be disabled

### *12.8.2.2 Edits*

Upon selection of the OK button, the system will check that legitimate values are entered in the controls as follows:

- If a value is entered in the Termination Date masked edit box, it must be a date equal to or greater than the current system date
- If a value is entered in the Termination Date masked edit box, it must be a date less than or equal to the end of the current certification period for the participant

Upon successful completion of the above-listed edits, the system will perform the following cross-edits:

- If the Terminate Participant check box is selected, an entry is required in the Termination Date masked edit box

### 12.8.2.3 Terminate Participant

Upon successful completion of the above-listed edits, if the Terminate Participant check box is selected the system will terminate the participant.

### 12.8.2.4 Produce VOC Document

Upon successful completion of the above-listed edits, the system will produce the Verification of Certification (VOC) document described in this document.

### 12.8.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Terminated Participant	Member	Terminated (value set to Y if check box is marked)	
Termination Date	CertContact Member	CertTermDate TerminatedDate	
Termination Reason	CertContact	CertTermReason (value set to 3 = Moved out of State)	
VOCDocument(system generated)	Member	VOCDocument (value set to N)	

### 12.9 VOC Document (Output)

This report allows the user to print a summary report of participant information at a Clinic for use as a Verification of Certification (VOC) document.

Verification of Certification Document			
System Name	Your State WIC Program	4/06/1997	
<STAFF MEMBER>		12:30:00	
Verification of Certification		Page	1
Mary K. Smith			
State WIC ID:	00001303	Household WIC ID:	12345678
DOB:	12/21/1987	Date Income Determined:	1/27/1997
-----			
Certification Information			
Start:	02/01/1997	End:	07/30/1997
Category:	Pregnant	Priority:	1
-----			
Blood Work	Date	HGB	HCT
	01/27/1997	18.0	18.4
			12 34
-----			
Height/Weight	Date	Height	Weight
	01/27/1997	5 feet 6 inches	147 pounds 2 ounces
-----			
Risk Factors	Determined Risk Factor		
	Anemia (High Risk)		
	Inadequate Intake of Dairy Group		
-----			
Food Instruments	First Use Date	Last Use Date	# Chks Issued
	01/27/1997	02/27/1997	3
	02/02/1997	03/02/1997	2
	04/02/1997	04/02/1997	2
-----			
Clinic WIC Program			
6537 Walter Lane			
Anytown, KS 66210-2371			
555-555-2987			
Agency Representative		Participant or Authorized Representative	
-----		-----	
(Print Full Name)		(Print Full Name)	
-----		-----	
(Signature)		(Signature)	

## 12.9.1 Data Elements

This section describes the data elements that will print on the report.

### 12.9.1.1 Report Title

The title of the report will be the text “State Department of Health” and include your state name. The first subtitle will be the text “WIC Program”. The second subtitle will be the text “Verification of Certification”. The third subtitle will be the full name of the participant.

#### 12.9.1.1.1 Origin of Data Element

The full name of the participant will be taken from the Last-Name, First-Name, and Middle-Initial attributes of the MEMBER entity.

#### 12.9.1.1.2 Format

The value will print in {first name} {middle initial}. {last name} format.

### 12.9.1.2 State WIC ID

This value will be the State WIC ID of the participant.

#### 12.9.1.2.1 Origin of Data Element

The value will be taken from the State-WIC-ID attribute of the MEMBER entity.

#### 12.9.1.2.2 Format

The value will print as its literal value.

### 12.9.1.3 Household WIC ID

This value will be the Household ID of the participant.

#### 12.9.1.3.1 Origin of Data Element

The value will be taken from the Household-ID attribute of the MEMBER entity.

#### 12.9.1.3.2 Format

The value will print as its literal value.

#### *12.9.1.4 Date of Birth (DOB)*

The value will be the date of birth declared by the participant as an element of enrollment.

##### 12.9.1.4.1 Origin of Data Element

The value will be taken from the Date-of-Birth attribute of the MEMBER entity.

##### 12.9.1.4.2 Format

The value will print as its literal value.

#### *12.9.1.5 Date Income Determined*

This value will be the date on which income eligibility for the current certification period was determined.

##### 12.9.1.5.1 Origin of Data Element

The value will be taken from the Screen-Date attribute of the INCOME-CONTACT entity.

##### 12.9.1.5.2 Format

The value will print as its literal value.

#### *12.9.1.6 Certification Start Date (Start)*

This value will be the date from which the participant is certified and can utilize WIC benefits.

##### 12.9.1.6.1 Origin of Data Element

The value will be taken from the Cert-Effective-Date attribute of the CERT-CONTACT entity.

##### 12.9.1.6.2 Format

The value will print in MM/DD/CCYY format.

#### *12.9.1.7 Certification End Date (End)*

This value will be the end date after which the participant is no longer certified and cannot utilize WIC benefits.

#### 12.9.1.7.1 Origin of Data Element

The value will be taken from the Cert-End-Date attribute of the CERT-CONTACT entity.

#### 12.9.1.7.2 Format

The value will print in MM/DD/CCYY format.

### 12.9.1.8 WIC Category (*Category*)

This value will be the WIC Category of the participant.

#### 12.9.1.8.1 Origin of Data Element

The value will be the lookup value from the reference dictionary table of the lookup database for WIC-Status attribute of the MEMBER entity.

#### 12.9.1.8.2 Format

The value will print as its literal value.

### 12.9.1.9 Priority

The value will be the priority determined for the WIC participant for the current certification period based on determined risk factors.

#### 12.9.1.9.1 Origin of Data Element

The value will be derived from the Cert-Assigned-Priority attribute of the CERT-CONTACT entity.

#### 12.9.1.9.2 Format

The value will print as its literal value.

### 12.9.1.10 Date of Blood Work

The value will be the date that blood work was completed for the participant.

#### 12.9.1.10.1 Origin of Data Element

The value will be taken from the Result-Date attribute of the BLOOD-WORK entity.

#### 12.9.1.10.2 Format

The value will print in MM/DD/CCYY format.

#### *12.9.1.11 Hemoglobin Measure of Blood (HGB)*

The value will be the hemoglobin value of the blood work results of the participant.

##### 12.9.1.11.1 Origin of Data Element

The value will be taken from the Hemoglobin attribute of the BLOOD-WORK entity.

##### 12.9.1.11.2 Format

The value will print in ##.# format.

#### *12.9.1.12 Hematocrit Measure of Blood (HCT)*

The value will be the hematocrit value of the blood work results of the participant.

##### 12.9.1.12.1 Origin of Data Element

The value will be taken from the Hematocrit attribute of the BLOOD-WORK entity.

##### 12.9.1.12.2 Format

The value will print in ##.# format.

#### *12.9.1.13 Lead Measure of Blood (Lead)*

The value will be the lead value of the blood work results of the participant.

##### 12.9.1.13.1 Origin of Data Element

The value will be taken from the Lead attribute of the BLOOD-WORK entity.

##### 12.9.1.13.2 Format

The value will print in ## format.

#### *12.9.1.14 E.P. Measure of Blood (E.P.)*

The value will be the E.P. value of the blood work results of the participant.

##### 12.9.1.14.1 Origin of Data Element

The value will be taken from the EP attribute of the BLOOD-WORK entity.

##### 12.9.1.14.2 Format

The value will print in ## format.

#### *12.9.1.15 Reason Not Collected*

The value will be the reason why blood work measurements were not collected for the participant

##### 12.9.1.15.1 Origin of Data Element

The value will be taken from the Exception-Reason attribute of the BLOOD-WORK entity.

##### 12.9.1.15.2 Format

The value will print as its literal value.

#### *12.9.1.16 Date of Height/Weight Measurement*

The value will be the date that the height/weight measurements were taken.

##### 12.9.1.16.1 Origin of Data Element

The value will be taken from the Measurement-Date attribute of the ANTHROP-CONTACT entity.

##### 12.9.1.16.2 Format

The value will print in MM/DD/CCYY format.

#### *12.9.1.17 Height Measurement*

The value will be the height of the participant in standard terms of feet and inches. Inches may include eighths of inches as in the case of infants.

#### 12.9.1.17.1 Origin of Data Element

The value will be taken from the Length-Inches and Length-Eighths attributes of the ANTHROP-CONTACT entity. The value of the Length-Inches attribute will be divided by twelve to derive the number of feet. The remainder of inches and eighths will be stated together in one component (i.e. 6 2/8).

#### 12.9.1.17.2 Format

The values will print in a concatenated format of measurement and literals. For example, "1 foot 2 3/8 inches" would be derived from 14 inches and three eighths.

### 12.9.1.18 *Weight Measurement*

The value will be the number of pounds and ounces of the weight of the participant.

#### 12.9.1.18.1 Origin of Data Element

The value will be taken from the Weight-Pounds and Weight-Ounces attributes of the ANTHROP-CONTACT entity.

#### 12.9.1.18.2 Format

The values will print in a concatenated format of measurement and literals. For example, "147 pounds and 3 ounces" would be derived from 147 and 3 respectively in the table fields of Weight-Pounds and Weight-Ounces.

### 12.9.1.19 *Risk Factor*

The value will be the risk factors assigned to the participant for the current certification. The risk factors may be system applied or manually applied.

#### 12.9.1.19.1 Origin of Data Element

The value will be the lookup value from the reference dictionary table of the lookup database for the Risk-Factor-ID attribute of the RISK-FACTOR entity.

#### 12.9.1.19.2 Format

The value will print as its literal value.

#### *12.9.1.20 High Risk Warning Value Label*

This value label will alert the user that the household participant is considered to be high risk.

##### 12.9.1.20.1 Origin of Data Element

The value label will contain the text “(High Risk)” if the risk factor is considered to be high risk.

##### 12.9.1.20.2 Format

The value will print as its literal value.

#### *12.9.1.21 Food Instrument First Use Date*

This value will be the first date that the food instrument can be used by the participant.

##### 12.9.1.21.1 Origin of Data Element

The value will be taken from the First-Use-Date attribute of the FOOD-INSTRUMENT-SET entity.

##### 12.9.1.21.2 Format

The value will print in MM/DD/CCYY format.

#### *12.9.1.22 Food Instrument Last Use Date*

This value will be the last date that the food instrument can be used by the participant.

##### 12.9.1.22.1 Origin of Data Element

The value will be taken from the Last-Use-Date attribute of the FOOD-INSTRUMENT-SET entity.

##### 12.9.1.22.2 Format

The value will print in MM/DD/CCYY format.

#### *12.9.1.23 Number of Checks Issued (# Chks Issued)*

This value will be an aggregate count of the number of instruments received by the participant at that print date.

#### 12.9.1.23.1 Origin of Data Element

The value will be a summary of the number of food instruments issued for each set of checks listed.

#### 12.9.1.23.2 Format

The value will print in ### format.

#### *12.9.1.24 Local Agency Name*

This value will be the local agency where the participant was enrolled.

#### 12.9.1.24.1 Origin of Data Element

The value will be taken from the look up database.

#### 12.9.1.24.2 Format

The value will print as its literal value.

#### *12.9.1.25 Local Agency Address*

This value will be the address of the local agency for which the participant was enrolled. It will consist of the street address, city, state, and zip code.

#### 12.9.1.25.1 Origin of Data Element

The value will be taken from the lookup database. The Value of your state "AA" will be used as the state.

#### 12.9.1.25.2 Format

The value will print as its literal, concatenated value.

#### *12.9.1.26 Clinic Telephone Number*

This value will be the telephone number of the Clinic the participant may call.

#### 12.9.1.26.1 Origin of Data Element

The value will be taken from the look up database.

#### 12.9.1.26.2 Format

The value will print as its value in format ###-###-####.

## **12.9.2 Filter Criteria**

### *12.9.2.1 Selected Participant*

Only information for the selected participant will be included in the report.

### *12.9.2.2 Current Certification Period*

Only blood work results, anthropometric measurements, risk factors, and food instruments recorded for the participant during the current certification period will be included in the report.

### *12.9.2.3 Valid Food Instruments*

Only food instruments that were issued, and not voided or reported stolen, will be included in the report.

## **12.9.3 Sort Order - Food Instruments**

### *12.9.3.1 First Use Date*

The food instruments will be sorted by the first date that the food instrument can be used.

### **12.10 Manage Household EBT Account**

The Manage Household EBT Account dialog allows the user to manage EBT account for the household of the selected participant. It is invoked when the user performs any of the following actions:

- Selects the Manage Household EBA menu option on the Participant List Menu on the Participant List window. (It is view only from State Office)
- Pressing the EBT Account button on the EBT Food Instrument Detail dialog.
- Pressing the EBT Account button on the Create New Household dialog.

All members in the household are issued EBT or the household is not an EBT household. If a member must participate in a food delivery system other than EBT then they must be in a household of their own.

This option will be **disabled** if the `FI_ENABLE_DELIVERYSYSTEMTYPE_EBT` business rule is set to “N” (No) or if the ServiceSite logged into is not EBT certification status is set to “Not Ready”.

The screenshot shows a Windows-style dialog box titled "Manage Household EBT Account". The dialog contains the following elements:

- Address Section:** A large text box for "Address", and smaller boxes for "County", "City", "State", "ZIP", and "Telephone" (containing "555-555-1212").
- EBT Section:** A container labeled "EBT" containing:
  - Two rows for "Authorized Representative/Proxy Name", each with "Last", "First", and "MI" input fields.
  - A "Benefit Period Start Day" spinner box set to "02".
  - An "EBT PAN#" input field.
  - Five action buttons: "Assign EBT Card", "Load EBT Card", "Terminate EBT Card", "Display EBT Card", and "View Aggregated Issuance".
- Bottom Section:** Three buttons: "Reconciled Transactions", "EBT Card History", and "OK", followed by a "Cancel" button.

Figure 9 - Manage Household EBA Account Dialog

### 12.10.1 Controls

This section describes the behavior of the controls on the Manage Household EBT Account dialog.

#### 12.10.1.1 Residence Address Text Box (Address)

This control allows the user to view the residence address of the household. The control will be disabled when the Manage Household EBT Account dialog is active.

#### 12.10.1.2 Residence County Text Box (County)

This control allows the user to view the residence county of the household. The control will be disabled when the Manage Household EBT Account dialog is active.

### *12.10.1.3 Residence City Text Box (City)*

This control allows the user to view the valid local municipality or residence city of the household. The dropdown will be disabled when the Manage Household EBT Account dialog is active.

### *12.10.1.4 Residence State Masked Edit Box (State)*

This control allows the user to view the residence state of the household. The control will be enabled when the Manage Household EBT Account dialog is active.

### *12.10.1.5 Residence ZIP Code Text Box (ZIP)*

This control allows the user to view the ZIP code of the household. The control will be disabled when the Manage Household EBT Account dialog is active. The mask for the box will be “#####.####”.

### *12.10.1.6 Telephone 1 Masked Edit Box*

This control allows the user to view the first telephone number at which the household participants may be reached. The control will be disabled when the Manage Household EBT Account dialog is active.

### *12.10.1.7 Authorized Representative/Proxy 1 Last Name Text Box (Last)*

The text box will be enabled when the Manage Household EBT Account is active. The control will only accept entry of alpha and the following characters ( ‘ , . - ). The maximum size of this control will be twenty-five (25) characters. It will initially be blank. This is the name of the person who will have access to the Card PIN.

### *12.10.1.8 Authorized Representative/Proxy 1 First Name Text Box (First)*

The text box will be enabled when the Manage Household EBT Account is active. The control will only accept entry of alpha and the following characters ( ‘ , . - ). The maximum size of this control will be twenty (20) characters. It will initially be blank.

### *12.10.1.9 Authorized Representative/Proxy 1 Middle Initial Text Box (MI)*

The text box will be enabled when the Manage Household EBT Account is active. The control will only accept entry of alpha characters. The maximum size of this control will be one (1) character. It will initially be blank.

#### ***12.10.1.10 Authorized Representative/Proxy 2 Last Name Text Box (Last)***

The text box will be enabled when the Manage Household EBT Account is active. The control will only accept entry of alpha and the following characters ( ' , . - ). The maximum size of this control will be twenty-five (25) characters. It will initially be blank. This is the name of the person who will have access to the Card PIN.

#### ***12.10.1.11 Authorized Representative/Proxy 2 First Name Text Box (First)***

The text box will be enabled when Manage Household EBT Account is active. The control will only accept entry of alpha and the following and the following characters ( ' , . - ). The maximum size of this control will be twenty (20) characters. It will initially be blank.

#### ***12.10.1.12 Authorized Representative/Proxy 2 Proxy Middle Initial Text Box (MI)***

The text box will be enabled when the Manage Household EBT Account is active. The control will only accept entry of alpha characters. The maximum size of this control will be one (1) character. It will initially be blank.

#### ***12.10.1.13 EBT PAN Number Text Box***

The text box will be disabled when the Manage Household EBT Account dialog is active. The maximum size of this control will be twenty (20) digits. It will initially be blank. This control allows the user to view the last EBT card primary account number assigned to the household. The card is loaded into a card reader and recorded into the database household record. Any previously assigned cards to the household EBT account would have been terminated.

#### ***12.10.1.14 EBT Benefit Period Start Day Spin Button***

The spin button will be enabled when the Manage Household EBT Account dialog is active. The maximum size of this control will be two (2) digits. It will initially be blank. This control allows the user to view the current EBT benefit start day assigned to the household. All members EBT food instrument issuance will be synchronized to begin on this benefit period start day for card loading purposes.

#### *12.10.1.15 Assign EBT Card Button*

This control allows the user to Assign EBT Card to this Household. To replace a card, first terminate the card then assign a new card. Only one active card can be assigned to an EBT account. The button will be disabled if the Household is currently assigned an EBT card with a status of assigned in the EBTCARDACCT table.

#### *12.10.1.16 Terminate EBT Card Button*

This control allows the user to Terminate EBT Card currently assigned to this Household. The button will be disabled if the Household is not currently assigned an EBT card with a status of assigned in the EBTCARDACCT table.

This option will be **disabled** if the FI\_ENABLE\_DELIVERYSYSTEMTYPE\_EBT business rule is set to “N” (No) or if the clinic logged into is not EBT certification status is set to “Not Ready”.

This option will be **disabled** if the FoodDeliverySystemEBT value in the ServiceSite table for this clinic is set to “N” (No)

This option will be **disabled** if the CompletedEBTCertification value in the ServiceSite table for this clinic is set to “N” (No) meaning the ServiceSite logged into has not been certified as EBT Compliant.

#### *12.10.1.17 Load EBT Card Button*

This control allows the user to Load Benefits onto the EBT Card currently assigned to this Household. All of the issued EBT benefits were summarized within the same participation period by food category and subcategory to load the card

#### *12.10.1.18 Display EBT Card Button*

This control allows the user to Display EBT Card contents currently loaded on the card assigned to this Household.

#### *12.10.1.19 View Aggregated Issuance Button*

This control allows the user to view all of the benefits issued to all members of the household assigned to this EBT account aggregated together and summarized by the EBT food category/subcategory.

#### *12.10.1.20 Reconciled Account Transactions Button*

This control allows the user to display Reconciled Account Transactions for any card assigned to this Household.

### 12.10.1.21 EBT Card History Button

This control allows the user to Display every EBT card ever assigned to this Household.

### 12.10.1.22 OK Button

This control allows the user to instruct the system to edit the values of the controls, save the changes, and exit the Manage Household EBT Account dialog. The OK button will be enabled when the Manage Household EBT Account dialog is active. (See *Saving the Data* in the Processing section below) Characteristics for the OK button are defined in *Consistencies*.

### 12.10.1.23 Cancel Button

This control allows the user to exit the Manage Household EBT Account dialog without creating a new household and changing the Household ID of the participant. The Cancel button will be enabled when the Manage Household EBT Account dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 12.10.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Manage Household EBT Account dialog.

### 12.10.2.1 Initializing the Interface

The title bar text is set to “Manage Household EBT Account”

The following values will initially be blank:

- Authorized Representative/Proxy Name 1
- Authorized Representative/Proxy Name 2
- EBT Account PAN#
- Benefits Period Start Day

### 12.10.2.2 Edits

Upon selection of the OK button, the system will check that values have been entered in the following controls:

- The EBT Account PAN# is populated by the card reader api – EBT COMPLIANT
- Benefits Period Start Day must be valued from 01-28 to ensure a calendar day exists for the selected day.
- Authorized Representative/Proxy Name 1
- Authorized Representative/Proxy Name 2

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text “An entry is required for the {descriptive name of value represented by control}”.

Upon successful completion of the above-listed edits, the system will check for legitimate values in controls as follows:

At least one member must be assigned to the household with an active certification or the system will invoke a standard error message with the text “At least one member in the household needs to be in an active certification before an EBT card is assigned to the household.”

#### *12.10.2.3 Manage Household EBT Account*

Upon selection of the OK button, if the household does not have an EBT Account the system will retrieve the next available EBT Account ID and create an EBT Account record for the Household. A household can have only one EBT Account. If the household does have an EBT Account the system will update the existing EBT Account record for the Household.

#### *12.10.2.4 Assign EBT Card Button*

Upon selection of the Assign EBT Card button, if the Household already has an activated EBT card assigned, the system will invoke a standard error message with the text “An EBT card is already assigned. To replace a card, first terminate the card then assign a new card. Only one active card can be assigned to an EBT account.”

If the household does not have an EBT card assigned, a card will be assigned and a record will be added to history. See the data map for assign card.

#### *12.10.2.5 Terminate EBT Card Button*

Upon selection of the Terminate EBT Card button, if the Household does not already has an activated EBT card assigned, the system will invoke a standard error message with the text “An active EBT card is not assigned to this household. ”

If the household does have an EBT card assigned the card will be terminated and a record will be added to history. See the data map for terminate card.

12.10.2.6 Data Map

Control Label	Entity	Attribute	Business Rule
	EBAccount	HouseholdID	
	EBAccount	EBAccountID	
Authorized Representative/Proxy 1 Last Name	EBAccount	AuthRepProxyLastName1	
Authorized Representative/Proxy 1 First Name	EBAccount	AuthRepProxyFirstName1	
Authorized Representative/Proxy 1 Middle Initial	EBAccount	AuthRepProxyMiddleInitial1	
Authorized Representative/Proxy 2 Last Name	EBAccount	AuthRepProxyLastName2	
Authorized Representative/Proxy 2 First Name	EBAccount	AuthRepProxyFirstName2	
Authorized Representative/Proxy 2 Middle Initial	EBAccount	AuthRepProxyMiddleInitial2	
EBT Benefit Period Start Day	EBAccount	BenefitPeriodStartDay	
EBT PAN# (Assign or Terminate)	EBTCardAcct	EbtCardPANNbr	
EBT PAN# (Assign or	EBTCardAcct	EbtCardPANNbr	

Terminate)	History		
EBT PAN# (Assign or Terminate)	EBTCardAcct  History	Status  If Assigned, the status = "A"  If Terminated, the status = "T"	
EBT PAN# (Assign or Terminate)	EBTCardAcct  History	StatusDttm = System Date	
EBT PAN# (Assign or Terminate)	EBTCardAcct  History	EBAccountID	

## 12.11 EBT Card History

The EBT Card History dialog allows the user to view all of the EBT Cards ever assigned to this household's EBT account. It is invoked when the user selects the EBT Card History from the Manage Household EBT Account dialog.

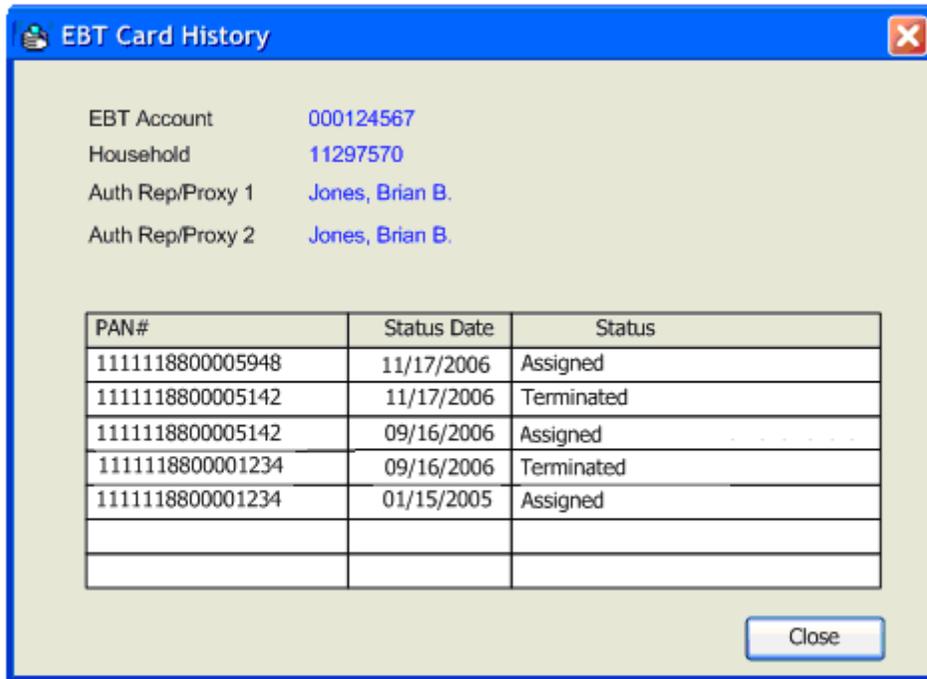


Figure 10 - EBT Card History Dialog

### 12.11.1 Controls

This section describes the behavior of the controls on the EBT Card History dialog.

#### 12.11.1.1 EBT Account Text and Value Label

This control is displayed when the EBT Card History dialog is active. This control allows the user to view the Household EBT account number.

#### 12.11.1.2 Household Text and Value Label

This control is displayed when the EBT Card History dialog is active. This control allows the user to view the Household ID.

### *12.11.1.3 AuthRep/Proxy 1 Text and Value Label (Name)*

This control is displayed when the EBT Card History dialog is active. This control allows the user to view the name of the person who will have access to the Card PIN.

### *12.11.1.4 AuthRep/Proxy 2 Text and Value Label (Name)*

This control is displayed when the EBT Card History dialog is active. This control allows the user to view the name of the person who will have access to the Card PIN.

### *12.11.1.5 EBT Card History Display Grid*

This control allows the user to view the history of EBT Cards assigned to this EBT account. The display grid will be enabled when the EBT Card History dialog is active. It will consist of the following columns:

- PAN#
- Status (See: Reference Dictionary EBTCARDSTATUS)
- Status Date

The grid will contain an entry for each card recorded for the EBT account. The entries will be sorted in reverse chronological order according to the contents of the Status Date column. The values on the grid are read-only.

### *12.11.1.6 Close Button*

This control allows the user to close the EBT Card History dialog. The control will be enabled when the EBT Card History dialog is active. Characteristics for the Close button are defined in *Consistencies*.

## **12.11.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the EBT Card History dialog.

### *12.11.2.1 Initializing the Interface*

The title bar text is set to “EBT Card History”

### *12.11.2.2 Edits*

None.

12.11.2.3 Data Map

Control Label	Entity	Attribute	Business Rule
EBT Account	EBAccount	EBAccountID	
Household	EBAccount	HouseholdID	
Auth Rep/Proxy 1	EBAccount	AuthRepProxyLastName 1  AuthRepProxyFirstName 1  AuthRepProxyMiddleInitial1	
Auth Rep/Proxy 2	EBAccount	AuthRepProxyLastName 2  AuthRepProxyFirstName 2  AuthRepProxyMiddleInitial2	
EBT Benefit Period Start Day	EBAccount	BenefitPeriodStartDay	
PAN#	EBTCardAcct History	EbtCardPANNbr	
Status	EBTCardAcct History	Status  (Display the description from EBTCARDSTATUS)	
Status Date	EBTCardAcct History	StatusDttm	

## 12.12 EBT Reconciled Account Transactions

The EBT Reconciled Account Transactions dialog allows the user to view all of the EBT transactions that have been received from the settlement system and reconciled to the household's EBT account. It is invoked when the user selects the EBT Reconciled Account Transactions from the Manage Household EBT Account dialog.

Vendor	Vendor/Merchant	PAN#	Rdmd Date	Food Category/Subcategory	Status	Rdmd	SerialNo	Paid Tot	Claim
000001	Sun Fresh Market	12345678901234597890	01/03/2005	01-Milk 001-Whole	RDM	6.00	00125785	6.25	6.25
000001	Sun Fresh Market	12345678901234567890	01/03/2005	02-Cheese 000-All Authorized	RDM	2.00	00125785	5.31	5.31
000003	Wal-Mart	12345678901234567890	01/07/2005	03-Eggs 000-Eggs	RDM	1.00	00125785	.89	.89
000003	Wal-Mart	12345678901234567890	01/07/2005	04-Juice 001-Concentrate	RDM	4.00	00125785	8.25	8.25
000003	Wal-Mart	12345678901234567890	01/07/2005	05-Cereal 000-Dry Cereal	RDM	12.30	00125785	2.98	2.89
000003	Wal-Mart	12345678901234567890	01/07/2005	06-Legumes 001-Dry Beans	RJCT	1.00	00125785	.00	1.50
000003	Wal-Mart	12345678901234567890	01/07/2005	06-Legumes 002-Peanut Butter	RDM	1.00	00125785	1.16	1.16
000004	Super Market	12345678901234567890	01/15/2005	01-Milk 001-Whole	RDM	4.00	00125785	4.26	4.26
000004	Super Market	12345678901234567890	01/15/2005	02-Cheese 000-All Authorized	RDM	2.00	00125785	2.79	2.79

Figure 11 - EBT Reconciled Account Transactions Dialog

### 12.12.1 Controls

This section describes the behavior of the controls on the EBT Reconciled Account Transactions dialog.

#### 12.12.1.1 Reconciled Account Transactions Display Grid

This control allows the user to view the electronic benefits transactions that have been reconciled to this EBT account. The display grid contains the following columns:

- WIC System Vendor ID
- Vendor Name/External Merchant ID
- PAN# (EBT Card Number)
- Redemption Date
- EBT Food Category/Subcategory
- Status
  - Redeemed
  - Rejected (The reasons are handled in the settlement system reporting)

- EBT SerialNo
- Paid Total (The total amount paid for the transaction line)
- Claim (The amount the vendor claimed for the transaction)
- UOM (EBT Food Category/Subcategory Unit of Measure)

The grid will contain an entry for each EBT transaction recorded for the food instrument. The entries will be sorted in ascending order. The data in the grid is read-only.

Transactions are received from the settlement system (either on-line EBT processor or off-line EBT processor) and applied per a set of rules.

If the food item was redeemed by the vendor and the claimed amount was rejected it will have a transaction with a rejected status.

#### *12.12.1.2 Close Button*

This control allows the user to close the EBT Reconciled Account Transactions dialog. The control will be enabled when the EBT Reconciled Account Transactions dialog is active. Characteristics for the Close button are defined in *Consistencies*.

### **12.12.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the EBT Card History dialog.

#### *12.12.2.1 Initializing the Interface*

The title bar text is set to “EBT Card History”

#### *12.12.2.2 Edits*

None.

12.12.2.3 Data Map

Control Label	Entity	Attribute	Business Rule
EBT Account	EBAccount	EBAccountID	
Vendor	FoodInstrumentItemEbtRdm	VendorID	
Vendor/Merchant	Vendor	TradeName  using the FoodInstrumentItemEbtRdm VendorID	
PAN#	EBTCardAcctActivityFI	EbtCardPANNbr	
Rdmd Date	FoodInstrumentItemEbtRdm	PurchaseDate	
Food Category/ Subcategory	FoodInstrumentItemEbtRdm	FoodCategoryCd  EBTFoodCatSubCategory .  FoodCatDescription  FoodSubCategoryCd  EBTFoodCatSubCategory .  FoodSubCatDescription	
Status	FoodInstrumentItemEbtRdm	“RDM” when PaidAmt is greater than zero        “RJCT” when PaidAmt is zero	
Rdmd	FoodInstrumentItemEbtRdm	QuantityRedeemed	
SerialNo	FoodInstrumentItemEbt	SerialNo	

Paid Tot (Paid or Settled Redemption Amount)	FoodInstrumentItemEbtRdm	PaidAmt	
Claim (Claimed Redemption Amount)	FoodInstrumentItemEbtRdm	PurchasePrice * UpcPackageSizeUnits	

### 12.13 EBT Aggregated Issuance

The EBT Aggregated Issuance dialog allows the user to view the aggregated issuance for the household for the specified participation period. All of the issued EBT benefits were summarized within the same participation period by food category and subcategory to load the card. When a card is reloaded for any reason, the redemption units for the period are summed and subtracted from the issuance before loading the card (as authorized units) otherwise the benefits could be repeated loaded and redeemed.

It is invoked when the user selects the EBT Aggregated Issuance from the Manage Household EBT Account dialog.

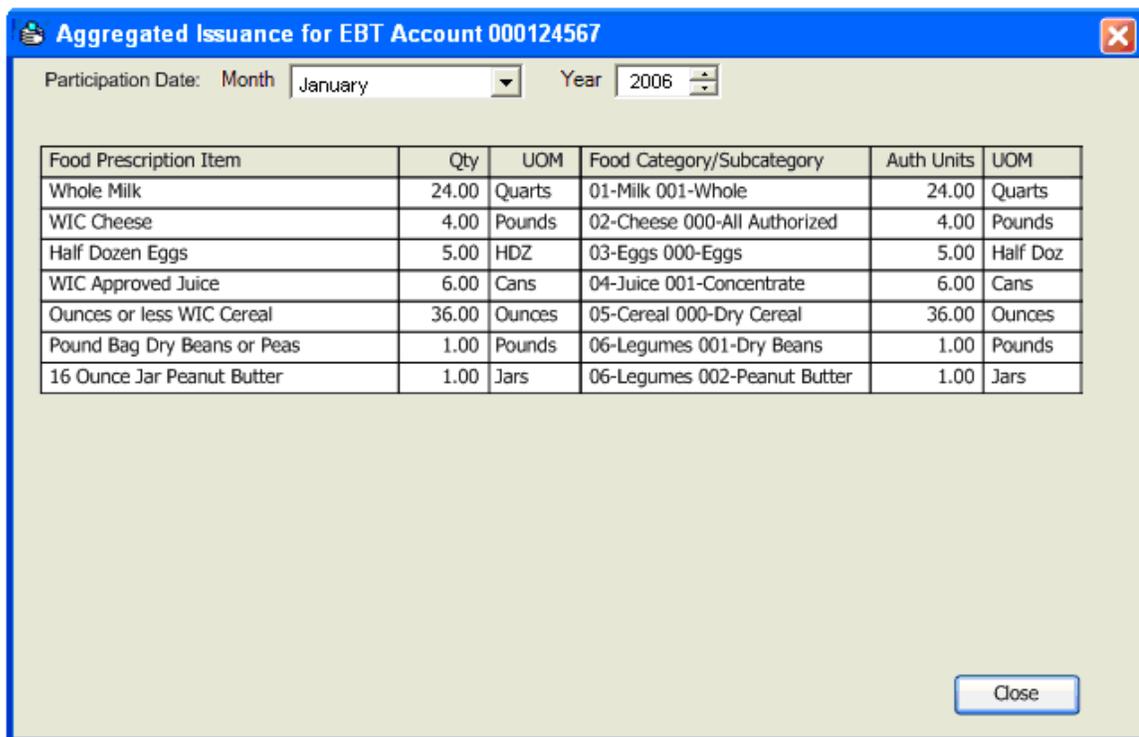


Figure 12 - EBT Aggregated Issuance Dialog

#### 12.13.1 Controls

This section describes the behavior of the controls on the EBT Aggregated Issuance dialog.

### *12.13.1.1 Participation Date: Month Dropdown*

This control allows the user to select participation month. The control will be enabled when the EBT Aggregated Issuance dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month.

### *12.13.1.2 Participation Date: Year Masked Edit Box and Spin Control*

This control allows the user to specify the year associated with the participation month. The masked edit box and spin control will be enabled when the EBT Aggregated Issuance dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### *12.13.1.3 Reconciled Account Transactions Display Grid*

This control allows the user to view the issuance summarized by food cat/subcat for all members EBT food instruments for the participation month. This summarized issuance will be loaded onto the EBT card. The display grid contains the following columns:

- Food Item Issued
- Quantity of Food Item Issued
- Unit of Measure of Food Item Issued
- EBT Food Category/Subcategory
- Number of Authorized EBT Food Cat/Subcat Units to be decremented at the time of purchase - Issued units minus the redeemed units for the period
- UOM (EBT Food Category/Subcategory Unit of Measure)

The grid will contain an entry for each food cat/subcat recorded for the participation month for the EBT account. The entries will be sorted in food category/subcategory order. The data in the grid is read-only.

### *12.13.1.4 Close Button*

This control allows the user to close the EBT Aggregated Issuance dialog. The control will be enabled when the EBT Aggregated Issuance dialog is active. Characteristics for the Close button are defined in *Consistencies*.

## **12.13.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the EBT Aggregated Issuance dialog.

### 12.13.2.1 Initializing the Interface

The title bar text is set to “EBT Aggregated Issuance”

### 12.13.2.2 Edits

None.

### 12.13.2.3 Data Map

Control Label	Entity	Attribute	Business Rule
EBT Account	EBAccount	EBAccountID	
	EBTCardAcc tActivity	EbtCardPANNbr	
	EBTCardAcc tActivityFi	FirstDateToSpend	
	FoodInstru mentEbt	FirstDateToSpend	
	FoodInstru mentSetEbt	ParticipationDate	
Food Prescription Item	FoodInstru mentItemEb t	FoodItemID is used to get the FoodItem.Description	
Qty (Food Prescription Items aggregated for the EBA Account and participation period)	FoodInstru mentItemEb t	FoodItemQuantity	
UOM (Food Prescription Items aggregated for the EBA Account and participation period)	FoodInstru mentItemEb t	FoodItemUOM	
Food Category/ Subcategory	FoodInstru mentItemEb t	FoodCategoryCd  EBTFoodCatSubCategory.	

		FoodCatDescription FoodSubCategoryCd EBTFoodCatSubCategory. FoodSubCatDescription	
Authorized Units (Always the same as the food item quantity for this system. Some systems allow the benefit to be defined in quarts for example and then decremented in gallons.)	FoodInstrumentItemEbt and FoodInstrumentItemEbtRdm	Issued units minus the redeemed units for the period:  FoodInstrumentItemEbt FoodItemQuantity minus FoodInstrumentItemEbtRdm Quantity Redeemed	
UOM	EBTFoodCatSubCategory	UnitOfMeasureCd	

### 12.14 EBT Account Balance

The EBT Account Balance dialog allows the user to view the current account balance for the household for the specified participation period.

It is only as current as the most recent completed reconciliation process.

based on the most recent completed reconciliation and

It is invoked when the user selects the EBT Account Balance from the Manage Household EBT Account dialog.



Figure 13 - EBT Account Balance Dialog

#### 12.14.1 Controls

This section describes the behavior of the controls on the EBT Account Balance dialog.

#### *12.14.1.1 Participation Date: Month Dropdown*

This control allows the user to select participation month. The control will be enabled when the EBT Account Balance dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month.

#### *12.14.1.2 Participation Date: Year Masked Edit Box and Spin Control*

This control allows the user to specify the year associated with the participation month. The masked edit box and spin control will be enabled when the EBT Account Balance dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### *12.14.1.3 EBT Account Balance Display Grid*

This control allows the user to view the issuance (Food Items and Quantities) summarized by food cat/subcat for all members EBT food instruments for the participation month. This summarized issuance will be loaded onto the EBT card. The display grid contains the following columns:

- Food Item Issued
- Quantity of Food Item Issued
- Unit of Measure of Food Item Issued
- EBT Food Category/Subcategory
- UOM (EBT Food Category/Subcategory Unit of Measure)
- Total Redeemed
- Remains (Number of Authorized EBT Food Cat/Subcat Units to be decremented at the time of purchase) The remains will calculate a zero balance when the benefit has expired, last use date is prior to today.

The grid will contain an entry for each food cat/subcat recorded for the participation month for the EBT account. The entries will be sorted in food category/subcategory order. The data in the grid is read-only.

#### *12.14.1.4 Print Balance of Account Button*

This control allows the user to print the balance of the current participation period. The print button will be enabled if the participation period is current or future. Otherwise it is disabled.

### 12.14.1.5 Close Button

This control allows the user to close the EBT Account Balance dialog. The control will be enabled when the EBT Account Balance dialog is active. Characteristics for the Close button are defined in *Consistencies*.

## 12.14.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the EBT Account Balance dialog.

### 12.14.2.1 Initializing the Interface

The title bar text is set to “EBT Account Balance for EBT Account:” plus the EBT AccountID.

### 12.14.2.2 Edits

None.

### 12.14.2.3 Data Map

Control Label	Entity	Attribute	Business Rule
EBT Account	EBAccount	EBAccountID	
	EBTCardAcctActivity	EbtCardPANNbr	
	EBTCardAcctActivity Fi	FirstDateToSpend	
	FoodInstrumentEbt	FirstDateToSpend	
Participation Date	FoodInstrumentSetEbt	ParticipationDate	
Food Prescription Item	FoodInstrumentItem Ebt	FoodItemID is used to get the FoodItem.Description	
Qty (Food Prescription Items aggregated for the EBA Account	FoodInstrumentItem Ebt	FoodItemQuantity	

Control Label	Entity	Attribute	Business Rule
and participation period)			
UOM (Food Prescription Items aggregated for the EBA Account and participation period)	FoodInstrumentItem Ebt	FoodItemUOM	
Food Category/ Subcategory	FoodInstrumentItem Ebt	FoodCategoryCd  EBTFoodCatSubCategory.  FoodCatDescription  FoodSubCategoryCd  EBTFoodCatSubCategory.  FoodSubCatDescription	
Authorized Units (Always the same as the food item quantity for this system. Some systems allow the benefit to be defined in quarts for example and then decremented in gallons.)	FoodInstrumentItem Ebt  and  FoodInstrumentItem EbtRdm	Issued units minus the redeemed units for the period:  FoodInstrumentItemEbt  FoodItemQuantity  minus  FoodInstrumentItemEbtRdm  Quantity Redeemed	

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>	<b>Business Rule</b>
UOM	EBTFoodCatSubCategory	UnitOfMeasureCd	
Tot Rdmd (Total Redeemed)	FoodInstrumentItem EbtRdm	QuantityRedeemed	
Remains		Calculated: The difference	

### 12.15 EBT Account Balance (Output)

This document is generated for the participant when the user selects the Print button from the EBT Account Balance dialog.

EBT Account Balance		
State WIC Program		
EBT Account Balance		
PAN# 12345678901234567890		
January 2006		
Mary M. Participant	EBT Account ID: 000124567	
Marvin Participant	Household ID: 00938738	
1234 Five		
Anytown, KS 66210		
555-555-9883		
01 Milk	001-Whole Milk	72.00 Quarts
02 Cheese	000-All Authorized Types	12.00 Pounds
03 Eggs	000 Eggs	7.50 Half Dozen
04 Juice	001 Concentrate	18.00 Cans
05 Cereal	000 Dry Cereal	108.00 Ounces
06 Legumes	001 Dry Legumes	3.00 Pkg
06 Legumes	002 Peanut Butter	3.00 Jars



#### 12.15.1 Data Elements

This section describes the data elements that will print on the document.

##### 12.15.1.1 EBT Account Auth Rep/Proxy1 Name

This value will be the full name of the EBT Account Auth Rep/Proxy1 Name.

#### 12.15.1.1.1 Origin of Data Element

The value will be taken from the Last-Name, First-Name, and Middle-Initial attributes of the .

#### 12.15.1.1.2 Format

The value will print in {first name} {middle initial}. {last name} format.

### *12.15.1.2 Household Mailing Address*

This value will be the mailing address of the household of the client.

#### 12.15.1.2.1 Origin of Data Element

The value will be taken from the Mail-Address of the HOUSEHOLD entity of the client.

#### 12.15.1.2.2 Format

The value will print as its literal value.

### *12.15.1.3 Household Mailing City*

This value will be the mailing city of the household of the client.

#### 12.15.1.3.1 Origin of Data Element

The value will be taken from the Mail-City of the HOUSEHOLD entity of the client.

#### 12.15.1.3.2 Format

The value will print as its literal value.

### *12.15.1.4 Household Mailing State*

This value will be the mailing state of the household of the client.

#### 12.15.1.4.1 Origin of Data Element

The value will be taken from the Mail-State attribute of the HOUSEHOLD entity of the client.

#### 12.15.1.4.2 Format

The value will print as its literal value.

### *12.15.1.5 Household Mailing ZIP Code*

This value will be the mailing ZIP code of the household of the client.

#### 12.15.1.5.1 Origin of Data Element

The value will be taken from the Mail-ZIP attribute of the HOUSEHOLD entity of the client.

#### 12.15.1.5.2 Format

The value will print in #####-#### format.

### *12.15.1.6 Household Telephone Number*

This value will be the telephone number of the client.

#### 12.15.1.6.1 Origin of Data Element

The value will be taken from the Telephone-1 attribute of the HOUSEHOLD entity for the household of the household member scheduled for the appointment.

#### 12.15.1.6.2 Format

The value will print in ###-###-#### format.

## **12.15.2 Filter Criteria**

### *12.15.2.1 EBT Account Aggregation*

The system will generate the balance on demand when the user indicates that a balance should be printed for the specified valid current or future participation period

## **12.15.3 Sort Order**

### *12.15.3.1 Food Category/Subcategory*

The food items will be printed in order by Food Category/Subcategory.

## **12.15.4 Control Breaks**

None

12.15.4.1 Data Map

Control Label	Entity	Attribute	Business Rule
EBT Account	EBAccount	EBAccountID	
	EBTCardAcctActivity	EbtCardPANNbr	
	EBTCardAcctActivityFi	FirstDateToSpend	
	FoodInstrumentEbt	FirstDateToSpend	
Participation Date	FoodInstrumentSetEbt	ParticipationDate	
(Auth Rep/Proxy 1)	EBAccount	AuthRepProxyLastName1 AuthRepProxyFirstName1 AuthRepProxyMiddleInitial1	
(Auth Rep/Proxy 2)	EBAccount	AuthRepProxyLastName2 AuthRepProxyFirstName2 AuthRepProxyMiddleInitial2	
(Household Address)	Household	MailAddress MailCity MailState MailZip	
(Household Telephone)	Household	Telephone1	
Food Prescription Item	FoodInstrumentItemEbt	FoodItemID is used to get the FoodItem.Description	

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>	<b>Business Rule</b>
Qty (Food Prescription Items aggregated for the EBA Account and participation period)	FoodInstrumentItemEbt	FoodItemQuantity	
UOM (Food Prescription Items aggregated for the EBA Account and participation period)	FoodInstrumentItemEbt	FoodItemUOM	
Food Category/ Subcategory	FoodInstrumentItemEbt	FoodCategoryCd  EBTFoodCatSubCategory.  FoodCatDescription  FoodSubCategoryCd  EBTFoodCatSubCategory.  FoodSubCatDescription	
Authorized Units (Always the same as the food item quantity for this system. Some systems allow the benefit to be	FoodInstrumentItemEbt  and  FoodInstrumentItemEbtRdm	Issued units minus the redeemed units for the period:    FoodInstrumentItemEbt	

Control Label	Entity	Attribute	Business Rule
defined in quarts for example and then decremented in gallons.)		FoodItemQuantity minus FoodInstrumentItem EbtRdm Quantity Redeemed	
UOM	EBTFoodCatSubCategory	UnitOfMeasureCd	